

# DESIGN BRIEFING:

Utilization of artefacts

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Master's thesis  
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## Abstract

When starting the design project, the results of its process are often only partially known. In general, the field of design consulting is based on the services provided to others. Therefore, the unknown nature of the design process results emphasize the importance of communication especially in the field of design consulting.

Purpose of this master's thesis is to seek understanding regarding the role of artefacts in that communication process between the clients and design consultants. when the directions of design projects are negotiated. This master's thesis reports an interview study conducted in ten different design consultancies. The objectives of this study were to describe the artefact production and using practices of design consultants when the procurement of the design projects is set and negotiated.

The finding of this study shows that design consultants produce a varietal collection of artefacts for different communicational purposes. Furthermore, the findings of this study imply that design consultants are actively producing and using artefacts not only to elicit and document project related information but also to foster and build relationships with potential clients. In addition, this thesis provides a taxonomy of the artefacts based on the interview study.

KEYWORDS briefing, design consulting, artefacts, design practise

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## Tiivistelmä

Lähdettäessä suunnitteluprojektiin sen prosessin tuloksista on usein vain osittaista tietoa. Yleisesti suunnittelukonsultointi perustuu muiden ihmisten palveluun. Tästä johtuen suunnitteluprosessin lopputulosten epävarma luonne korostaa erityisesti viestinnän merkitystä suunnittelukonsultoinnissa.

Tämän maisterin työn tavoitteena on etsiä ymmärrystä erilaisten materiaalien (artefaktien) merkityksestä asiakkaan ja suunnittelijakonsulttien välisessä viestintäprosessissa, kun suunnitteluprojektin suuntaviivoista neuvotellaan. Tämä maisterin työ raportoi haastattelututkimuksen, joka toteutettiin kymmenessä eri suunnittelutoimistossa. Tutkimuksen tavoitteena oli kuvata suunnittelukonsulttien käyttämiä materiaaleja neuvotellessa suunnittelu projektin aloittamisesta ja hankkimisesta.

Tässä tutkimuksessa tuli esiin, että suunnittelukonsultit tuottavat monimuotoisen kokoelman erilaisia materiaaleja viestintätarkoituksiin. Lisäksi tämän tutkimuksen tulokset osoittivat, että suunnittelukonsultit tuottavat ja käyttävät materiaalia sekä hankkimaan ja dokumentoimaan hankekohtaisia tietoja, että myös edistämään ja rakentamaan suhteita potentiaalsiin asiakkaisiin. Lisäksi lopussa tähän haastattelu tutkimukseen pohjautuva materiaalien taksonomia.

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## 1. Introduction

This master's thesis reports an interview study conducted in the context of professional industrial design consulting. The present study focuses on to describe the role of artefacts and their relationship to the briefing during the pre-project phase when the projects are set and discussed between design consultant and the client. When starting the design project, there is often a partial knowledge regarding the results of it. In addition, design projects are often by their nature future-oriented endeavors where the possibility of change is present during the course of the project. A common thought is that the design project starts with the design brief.

However, prior studies suggest that design briefs are seldom given to the design consultants (e.g, Ravasi, Marcotti and Stigliani, 2008). In addition, studies have shown that the design consultants work with limited information provided by the client at the pre-project stage (e.g, Hakatie and Ryyänen, 2007). Furthermore, these challenges affect how design consultants arrange and adapts their work practises during the pre-project stage (e.g., Park-Lee and Person, 2018). Therefore, various briefing practices can be considered as essential skill in design consulting, when setting the common ground for the design project between the client and design consultant.

In general, briefing have been a topic of interest in the design related literature. Especially the fields of architecture and construction (e.g., Duerk, 1993; Cherry, 1999; Blyth and Worthington, 2001; Peña and Parshall, 2001), visual communication and design management (e.g., Phillips, 2004) have published various guidebooks and recommendations of how to execute briefing activities. More grounded research, regarding the briefing, has been mostly done in different fields of architecture (e.g., Ryd, 2003, 2004b; Ryd and Fristedt, 2007; Bogers, van Meel and van der Voordt, 2008; Jensen, 2011) and requirement elicitation (e.g., Wild et al., 2010; Haug, 2015). In addition, design research, focusing the problem solving and -setting activities of designers, have addressed a degree of attention towards briefing (e.g., Dorst and Cross, 2001; Hey, Joyce and Beckman, 2007; Paton and Dorst, 2011).

However, Ryd (2003) has criticized that the briefing literature has emphasized much the brief creation at the early of the design project. Furthermore, Bogers, van Meel and van der Voordt (2008) imply that most of the briefing publication tend to focus on the perspective of the client and overlook the role of the designers in briefing. In addition, the publications in design research have reported various artefacts produced by designers to elicit and communicate project related information when interacting with the client (e.g., Goel and Pirolli, 1992; Lawson, 2006; Brandt, 2007; Luce-ro, 2012). In addition, the topic of briefing has also gained some attention in research conducted in the domain of design consulting, more directly (e.g., Ravasi, Marcotti and Stigliani, 2008; Park-Lee and Person, 2018) and indirectly (e.g., Bruce and Docherty, 1993; Kurvinen, 2005; Hakatie and Ryyänänen, 2007).

However, relatively less is known regarding what kind of artefact design consultants produce during the pre-project stage, and how the produced artefacts are related to briefing and challenges of it. In responding to this gap in the literature, this master's thesis aims to examine and describe the artefacts and role of the artefact in relation to briefing between design consultants and clients. In doing so, a qualitative semi-structured interview study was conducted in ten Finland based design consultancies. The analysis of interviews followed a thematic analysis presented by Braun and Clarke (2006). The present findings are reported as themes and discussed in the last section of this study.

This master's thesis aims to contribute to prior knowledge by identifying and naming the artefacts used in the pre-project phase. In doing, so the artefacts can be discussed and developed further. Secondly, when the artefacts and practices related to briefing are identified in design consulting, this may help students and educators to focus on the skills to produce these materials and practices. For instance, the findings of this study suggest that the skills to produce an offer or plan a design project with the client seemed rather important skills in the field of design consulting. Thirdly, the findings of this study can be used by design professionals as a point of comparison when evaluating and planning new artefacts for briefing purposes.

## 1.1 Thesis purpose, objectives and research questions

This thesis aims to deepen the understanding regarding the briefing practises and artefact production in the context of design consulting. In doing so, the research topic is approached from the perspective design consultants. This thesis aims to describe the design consultants practises regarding the the use and production of the artefacts during pre-project phase. The research questions of this master's thesis are:

What kind of artefacts does design consultants produce when preparing to negotiate with the client about the design project?

What kind of intents does design consultants have when using the produced artefacts?

What kind of contexts does affect the production of the artefacts?

## 1.2 Structure of the thesis

This master's thesis is structured into five chapters. Chapter two report the literature review which introduces and defines the key terms and concepts related to the topic of briefing and design consulting. In addition, the role of artefacts and the close relationship of briefing and problem-solving activities of design are paid attention. Chapter three report used the method and analysis of the conducted interviews. Chapter four describes the findings of the study. The findings are reported as themes which are arranged based on the research questions. The last chapter discusses the findings and connects them to the prior findings of the extant literature. Furthermore, the last chapter reflects the strength and limitations of the study and concludes the main findings. In addition, suggestions for further studies are presented.

## 2. Literature review

This master's thesis starts with the literature review which introduces the key terms and concepts related to the topic of briefing and client - designer relationships in design consulting. The literature review is divided into five sections. The first section provides an short overview of the topic of brief and briefing. In addition, the section discusses how briefing is approached in the professional briefing guidebooks. The second section draws a connection between the briefing and problem-solving activities of design. Furthermore, this section introduces the challenges related to that connection. The third section of the literature review draws a connection between the artefacts and its relationship to the briefing. The fourth section reports the related studies conducted in the field design consulting and their relationship to the context of the briefing. The last section summarises the main topics of the literature review.

### 2.1 Concepts of brief and briefing in the literature

In the field of design, the terms 'brief' and 'design brief' are used to describe a document that acts as a starting point to a design project (e.g., Blyth and Worthington, 2001, p. 58; Lawson, 2006, p. 182). For the purpose of clarity, this thesis uses the word design brief onwards unless otherwise mentioned. Commonly the design brief is described to contain essential information related to a design project (e.g., Blyth and Worthington, 2001; Phillips, 2004; Paton and Dorst, 2011; Ulrich and Eppinger, 2012). What is considered essential information, varies slightly with different fields of design, such as industrial design, architecture, and visual communication. Generally, the authors from different field of design suggests that the design brief should incorporate information regarding the project goals, objectives, timeframes, roles and responsibilities of the ones that participate in the project work (e.g., Blyth and Worthington, 2001, p. 69; Phillips, 2004, pp. 133–160; Ulrich and Eppinger, 2012, pp. 36–50).

Often the format of the design brief is a textual document or multiple textual documents, which are used to establish a common ground between-

different participants and set the course of a design project (e.g., Blyth and Worthington, 2001, p. 58; Phillips, 2004, p. 54; Prins et al., 2006). Some authors, such as Blyth and Worthington (2001, p. 58), and Phillips (2004, p. 42), suggest that the design brief should be revisited and refined during the design project if necessary. Additionally, there are more precautionary views regarding the uses of the design briefs. For instance, Prins et al. (2006) argue, that the brief should also have 'static' components, which should not be changed by slight grounds when setting the directions for the design project.

The term 'briefing' is generally described by various authors as a process, which is related to identifying, communicating and documenting the essential information related to a specific design project (e.g., Duerk, 1993; Blyth and Worthington, 2001; Peña and Parshall, 2001; Phillips, 2004; Jensen, 2011; Paton and Dorst, 2011; Ulrich and Eppinger, 2012; Park-Lee and Person 2018). According to the same authors, one outcome of the briefing process is the design brief or multiple design briefs. In general, the arrangement and management of the briefing process have been a topic of interest in the literature. Especially the fields of architecture and construction (e.g., Duerk, 1993; Cherry, 1999; Blyth and Worthington, 2001; Peña and Parshall, 2001), visual communication and design management (e.g., Phillips, 2004) have published various guidebooks and recommendations to execute briefing activities in project settings.

In general, the guidebooks of the briefing can be roughly divided into two different schools. The first school of the briefing is based on the idea that most of the briefing activities are done before any formal design activities (e.g., Duerk, 1993; Cherry, 1999; Peña and Parshall, 2001). The second school suggests that the briefing process is a continuous process which continues after the project is conducted (e.g., Nutt, 1993; Blyth and Worthington, 2001). Furthermore, both schools emphasize briefing activities differently. For instance, the first school emphasizes the activities of identifying the essential information regarding the project (e.g., Duerk, 1993; Cherry, 1999; Peña and Parshall, 2001). In contrast, the second school of briefing pays attention and emphasis to the managerial aspects of the project work and briefing. Furthermore, the second school of briefing incorporates the information identifying activities as one stage of the briefing process (e.g., Nutt, 1993; Blyth and Worthington, 2001). More grounded research in the field of architecture and construction has suggested that the continuous process of the briefing is more appropriate when conducting the briefing activities in complex project settings (e.g., Barrett, Hudson and Stanley, 1999; Jensen, 2006; Ryd and Fristedt, 2007).



## 2.2 Problem-solving and briefing

The intimate connection between problem-solving activities of design and briefing activities, has also been addressed by the briefing guidebooks (e.g., Cherry, 1999; Blyth and Worthington, 2001; Peña and Parshall, 2001; Phillips, 2004). The first school of briefing suggests that the briefing activities aim to analyze and, as a result, define the design problem. Distinctively, the first school of briefing describes the design as synthesizing activity which aims to provide a solution to a given problem. (Cherry, 1999, p. 3; Peña and Parshall, 2001, pp. 14–15; Phillips, 2004, p. 54) In contrast, the second school, with a focus on management activities, suggests that most of the briefing is carried out during the design activities (e.g., Blyth and Worthington, 2001). For instance, Blyth and Worthington (2001, pp. 20–21) argue that the briefing and design are two facets of the same process which is iterative, integrative and reflective by nature.

Reducing the design activities to problem-solving or synthesizing activities has been questioned and criticized in the field of design (e.g., Buchanan, 1995, p. 14; Lawson, 2006, p. 275). According to Cross (2007, pp. 99–100), design projects aim to solve problems that are widely accepted as a ‘form of ill-defined problems’. Cross (ibid) suggests that ill-defined problems refer to problems related to various informational gaps. For instance, the design problem to solve can be unclear or loosely defined by the client. Furthermore, the goals of the project can live, and given requirements might be undefined or in contradiction with each other (ibid). Lawson (2006, pp. 118–120) claims that the design problems are full of uncertainties because the nature of design is future-oriented.

Given that the ill-defined design problems are uncertain and future-oriented by nature, Cross (2007, p. 100) argues that experienced designers tend to behave as ‘ill-behaved’ problem solvers. Lawson (2006, p. 97) uses the word ‘solution focused’ to describe the problem-solving activities of designers. In addition, prior studies in the field of design have suggested that designers often intentionally consider the initial briefs as ill-defined to structure and formulate the ill-defined problem appropriately (e.g., Dorst and Cross, 2001; Paton and Dorst, 2011). In doing so, the designers seek new information again and again during a design project, until a matching pair of problem and solution is formulated (ibid). Design researchers, such as Maher and Boulanger (1996), and Dorst and Cross (2001), models this explorative ill-behaved solution focused problem-solving as a ‘co-evolution

of problem and solution’ which implies that the evolution of the problem and solution are not chronological; they tend to develop in parallel.

Studies on the cognitive and problem-solving aspects of design have also focused on the artefacts that designers create, such as sketches (e.g., Goel and Pirolli, 1992; Dorst and Cross, 2001; Lawson, 2006). Furthermore, Goel and Pirolli (1992) claim that there is some degree of correlation what’s happening in the designer’s cognition externalizes or materializes to some form of artefact during the process. For instance, Goel and Pirolli (1992, p.395) suggest that sketches created by designers are ‘external representations’ regarding the possible future directions taken. In that sense, the sketches produce new information when produced during a design project.

In addition, prior design studies regarding the designer’s practices to produce and use artefacts have drawn a connection between the activities of problem-solving, problem-setting and artefact production (e.g., Brandt, 2007; Lucero, 2012). Moreover, the briefing literature suggest that the one outcome of the briefing process is a design brief (e.g., Blyth and Worthington, 2001; Phillips, 2004; Paton and Dorst, 2011). Therefore, it may be that production of the design brief is already act of solving the problem.

## 2.3 Artefacts and briefing

According to several authors, the design brief can have various formats (e.g., Blyth and Worthington, 2001; Phillips, 2004; Ryd, 2004b; Lawson, 2006; Prins et al., 2006; Bogers, van Meel and van der Voordt, 2008; Jensen, 2011). For instance, the format of design brief can be a verbal expression, visualization, narrative, scale model or scenario picture. Additionally, few authors make notions that the design brief can be used as a contract, process planning tool, project tracking tool, and tool to gather requirements in cooperation with different participants of a project (e.g., Phillips, 2004; Prins et al., 2006). In general, it seems that the extant literature suggests that the format and communicational use of design brief can be quite diverse and rich.

However, Ryd (2003) has criticized that the literature related to the briefing has emphasized much the brief creation at the early of the project. Van

Meel and van der Voordt (2008) imply that one reason for this is that the briefing literature is often focusing on the perspective of the client rather than the designer. In addition, Ryd (2003, p. 98) claim that there is a gap between the availability of the briefing artefacts and use of the artefact among clients. In contrast, studies in design research has reported that designers use various artefacts, such as mood boards, sketches or mock-ups, to elicit and communicate the project related information during the design project (e.g., Lawson, 2006; Brandt, 2007; Lucero, 2012).

For instance, Lawson (2006, pp. 33–50) has highlighted the communicational purpose of the sketches in his categorization of different drawings made by designers. This categorization is based on the content and usage of the drawings during the design process. By examining the Lawson's drawing categorization from the perspective of the briefing, the examination reveals that some of the drawing categorizations do have briefing purposes. For example, Lawson (2006, p. 34) describes that the 'presentation drawings' are used by designers to communicate their work to other stakeholders, who may not have been involved in the design process in at first place, to gain permission or agreement to carry on design work. According to Lawson, the presentation drawings are used to provide information regarding the current state of the project (ibid).

Lawson's (2006, p. 36) another briefing related drawing category is 'consultation drawings'. Lawson (ibid) highlights that the consultation drawings are used to elicit information from clients, users or other participants during the design process. Furthermore, he suggests that the functions of these drawing are more on to support the design process, rather than present the outcomes of the design process. The communicational role of sketches has also been noted in the literature on the briefing. For instance, Bogers, van Meel, and van der Voordt (2008) reported how architects showed sketches to the client to negotiate the possibilities of the upcoming project.

Although formally the different artefact, such as sketches, mock-ups or mood boards, rely on different types of way to convey information. They are all used for communicational purposes and as a mean to elicit information during the design project by designers (e.g., Lawson, 2006; Brandt, 2007; Lucero, 2012). Furthermore, Brandt (2007, p. 191) argues that 'different kinds of mock-ups affect the communication between the participants in different ways and thus influence the design process itself'. Therefore, it seems, that the format of artefact affects to the communication, and thus the design process. However the briefing literatures tend to emphasize the

brief creation at the early of the project. (Ryd, 2003). Therefore, it seems, that the role of different artefacts produced by designers is overlooked in the briefing literature as a mean to elicit, document and communicate project related information.

Thus far this thesis has argued that the briefing has a complementary relationship to design and problem-solving activities (e.g., Cherry, 1999; Blyth and Worthington, 2001; Peña and Parshall, 2001; Phillips, 2004). Because of this, the briefing activities are having a relationship with the ill-defined problems and uncertainties. The reasons behind project related uncertainties can vary. However, the literature review suggests that the informational gaps do have a role in it (Cross, 2007, pp. 99–100). Given that the brief is essentially mean to communicate, it can be said that one goal of the briefing is to mitigate the challenges of uncertainties and ill-defined problems.

Furthermore, Lawson (2006, p. 97) argues that designers tend to focus on producing solutions when solving design problems. In other words, the production of different artefacts is closely connected to the problems solving activities of design. Moreover, these produced artefacts are used by designers to communicate and elicit the project related information during the design project (e.g., Lawson, 2006; Brandt, 2007; Lucero, 2012). Therefore, it seems that the artefacts produced by designers are used for briefing purposes and thus mitigate the uncertainties related to design projects and indentify the design problem.

## 2.4 Client relationship and briefing

Different client – designer relationship studies have reported that the briefing is a challenging practice in the field of design consulting (e.g., Bruce and Morris, 1994; Kurvinen, 2005; Hakatie and Ryyänen, 2007; Park-Lee and Person, 2018). For instance, Lee and Person (2018) discuss that the interrelated role of briefing and sales is creating a discontinuity to a briefing process after the project is commissioned. In addition, prior studies suggest that the clients are showing diverse proficiency in using design consulting services (Hakatie and Ryyänen, 2007; Alavuotunki, Halme and Salminen, 2015; Park-Lee and Person, 2018).

For instance, Bruce and Morris (1994, p. 595) report that the design brief may often be a 'nailed down' document for design consultants. Moreover, the challenges in briefing affect how design consultants arrange and adapt their work practises during the pre-project stage (e.g., Park-Lee and Person, 2018).

The roles and responsibilities of briefing have also been a topic of interest in the briefing and design literature. For instance, both schools of briefing claim that the briefing activities are responsibilities of a client (e.g., Blyth and Worthington, 2001; Peña and Parshall, 2001). In contrast, Lawson (2006) argues that responsibilities of the briefing are responsibilities of the designers. Phillips (2004) suggest that the briefing is an act of cooperation and should be done in partnerships with the client and designer when design projects are set. The researchers are suggesting a more neutral option in terms of an external facilitator (e.g., Ryd, 2004a; Jensen, 2006). In addition, Barret, Hudson and Stanley (1999) considered that briefing activities are often rather personal undertakings, and the skills to conduct briefing are learned from previous experiences.

Prior studies in design consulting report that the client – designer relationships are strongly based on personal and familiar relationships where mutual trust and respect are crucial to growing long-lasting partnerships. (e.g., Bruce and Docherty, 1993; Bruce and Morris, 1994). Furthermore, Bruce and Docherty (1993, p. 415) argue that long relationships 'allows the design firm to gain a better insight into the needs of the client and thereby produce quality design solutions'.

In addition, Lee and Person (2018) report that design consultants prefer long-term relationships with clients. Bruce and Docherty (1993, p. 420) suggest, that one prerequisite for long relationships between client and design consultant is a 'common language' which eases the transfer of information between both parties. In other words, working together eases the briefing between design consultant and client over the course of time. However, authors such as Hakatie and Ryyänen (2007), argues that the discontinuities and challenges in the information exchange can even lead to a change of the design consultant. In other words, the successful briefing practice in design consulting can be considered as a prerequisite for long client relationships.

However, a survey study conducted in Italy (Ravasi, Marcotti and Stigliani, 2008) suggests that design consultants seldom get design briefs from the client. For that reason, the consultants either proceed without the design brief or prepare the design brief internally based on initial discussions with a client. According to the authors (ibid), the joint negotiations are common practice among design consultants when potential design projects are set and discussed. Moreover, the Ravasi, Marcotti and Stigliani suggest (2008, p.12) that the consultants tend to 'challenge some expectations and assumptions' included in the design brief. This interpretation differs from Bruce and Morris (1994, p.595) who describe the design briefs as 'nailed down' for design consultants. In line with the Ravasi, Marcotti and Stigliani, Cross (2007, p. 102) has also mentioned that designers often intentionally consider the initial briefs as ill-defined to structure and formulate the ill-defined problem appropriately. Furthermore, Lawson (2006, pp. 85–87) suggest that formulating the design problems is affected partially by the client – designer relationship and the practises of designers.

## 2.5 Summarizing the literature review

As mentioned, in previous sections the artefacts produced by designers are closely linked to problem-solving practices and used to communicate and elicit the project related information. Moreover, the extant literature imply that the briefing is a rather important skill in design consulting to establish long-term client relations and secure sales (e.g., Bruce and Docherty, 1993; Hakatie and Ryyänen, 2007; Park-Lee and Person, 2018).

However, prior studies have pointed that there are challenges to conduct briefing in the field of design consulting (e.g., Bruce and Morris, 1994; Kurvinen, 2005; Hakatie and Ryyänen, 2007). Further, these challenges affect how design consultants arrange and adapt their work during the pre-project stage (e.g., Park-Lee and Person, 2018). However, the briefing literature has been criticized for focussing much on the development the brief and client perspective. (e.g., Ryd, 2003; Bogers, van Meel and van der Voordt, 2008). In contrast, the prior studies suggest that in the context of design consulting the role of design brief is minimal or it is produced in cooperation (e.g., Ravasi, Marcotti and Stigliani, 2008). Therefore, it may be that the briefing purposes of different artefacts made by designers are overlooked in briefing literature.

In general, relatively less is known regarding what kind of artefact design consultants produce for briefing purposes during the pre-project stage. Furthermore, how the produced artefacts are related to briefing and challenges of it. In responding to this gap in the literature, This thesis aims to deepen the understanding regarding the briefing practises and artefact production in the context of design consulting. In doing so, the research topic is approached from the perspective design consultants. Objective of this thesis is to describe the design consultants practises related to the use and production of the artefacts during pre-project phase. In the virtue of doing so, the following research questions were formulated:

What kind of artefacts does design consultants produce when preparing to negotiate with the client about the design project?

What kind of intents does design consultants have when using the produced artefacts?

What kind of contexts does affect the production of the artefacts?

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### 3. Method

The methodological course of qualitative research guides this master's thesis. The decision to select qualitative methodology relied upon several considerations, including the nature of the research question, development of authors personal competence areas and interest to acquire a more contextualized understanding of the research topic.

When the context of investigation lies in negotiations of work in between consultant and client, involved with the possible procurement of services, the interview study was considered as the most appropriate method to conduct data collection instead of observations. The considerations behind the method selection were based on the research context and authors resources. Firstly, the presence of an observer might affect the client-consultant interaction and hinder the procurement of the consultant services. Secondly, the resources to arrange an observation session as such were minimal, in terms of previous connections to the design consultancies, money and time. Furthermore, interview studies are common practice when researching the topic of briefing (e.g., Bogers, van Meel and van der Voordt, 2008) and design consulting (e.g., Bruce and Docherty, 1993; Paton and Dorst, 2011; Park-Lee and Person, 2018).

Kvale (1996, p. 125) defines the qualitative interview study as:

an interpersonal situation, a conversation between two partners about a theme of mutual interest. It is a specific form of human interaction in which knowledge evolves through a dialogue.

This selection of method affects the nature of collected data and the set's limitations to the conducted study. The collected data cannot represent how the material is used directly in consultant-client interactions, and thus in the briefing as such. However, the interviews can shed light on the intentions, orientations, and attitudes of a consultant when negotiating the design projects and using the artefacts.

When entering the domain of consult work with limited background information about the context, a semi-structured interview was considered as a most appropriate form to conduct the qualitative interview study. Kvale



(1996, p. 124) describes the semi-structured interviews as carefully planned interviews that are structured under specific themes and pre-planned questions. Kvale (ibid) suggests that the semi-structured interviews should have a certain openness or room to change and forms of questions to follow the dynamics of conversation by the given answers and stories told by the interviewee.

When planning a semi-structured interview, a literature review was conducted. This literature review had two purposes. Firstly, the literature review aimed to focus on relevant issues and more narrowly define the research topics and study what the pre-existing literature reveals about briefing processes and design consultant practices. Secondly, the literature review started the development of interview questions and the research questions. The interview guide was prepared with the guidance and help of supervisor and advisor of the master's thesis. The interview guide (APPENDIX 3 & 4) consisted of questions about the background of the interviewees and upcoming or latest client interactions about projects and preparations for those meetings. The word 'artefact' is rarely used and uncommon in the Finnish language. Therefore the word material was used instead as a proxy to the word artefact during interviews.

### 3.1 interviewee recruiting

Because of the author's education in industrial design, the consultants from the field of industrial design were decided to approach for the purposes of the study. Firstly, the author's own education and experience in industrial design was considered as a possibility to understand the nature of industrial design consultant work better than other related fields such as user experience design or service design.

In general, the profession of the Industrial design has matured in its development within past decades. For instance, Valtonen (2007, pp. 280–281) report, that the traditional roles of industrial designers in Finland have grown and changed as the profession has matured. Moreover, Valtonen (2007, p. 173) report, that the maturation of the industrial design profession has affected the domain of industrial design consulting. For instance, different industrial design consultancies have differentiated and specialized them-

selves in either specific area of expertise or a certain client sector. In addition, some of the industrial design consultancies have also expanded their services to broader domains of design catering different design services to their clients such as graphic design, interior architecture, service design and, brand development. Similarly, different consultancies mostly from the field of engineering and advertising have established their own industrial design departments. It is therefore likely that briefing practices of industrial design consulting have matured and developed as the profession has grown.

The interview recruiting process started with a search of the internet. In general, the field of industrial design is rather small in Finland and include small part-time one person companies (e.g., Lith, 2013). Therefore, during the recruiting process, the business development of different design consultancies and their work activity within past years were paid attention. The search aimed to identify full-time design consultancies which actively work in the field of industrial design consulting.

During the process of recruitment, the workers and their roles in the design consultancies were looked. The aim was to identify and recruit interviewees who interact with potential clients when design projects are negotiated and set. The author assumed that the experienced consultants or consultants in a managerial position are likely interacting with the potential client during the pre-project stage. In addition, the literature review suggested that briefing skills are learned by experience (e.g., Barrett, Hudson and Stanley, 1999).

The recruitment process identified fourteen different design consultancies. The consultancies were approached firstly with the recruitment letter (APPENDIX 1 & 2). The recruitment letter described the research topic and addressed the confidentiality of the study. After the initial contact, eleven consultants were willing to participate in this study.

### 3.2 Data collection

The data sample included ten interviews with eleven interviewees (TABLE 1) with an additional briefing and sales-related material from six consultancies based in Finland. Interviewed consultants worked in ten different

▼ Table 1: List of interviewees

INTERVIEWEE	POSITION	EXPERIENCE IN YEARS	INTERVIEW LENGTH IN MINUTES
A	MANAGING DIRECTOR	30	44:16:549
B	DESIGN MANAGER	23	52:17:829
C	CREATIVE DIRECTOR	22	43:44:471
D	DESIGN MANAGER	21	55:33:303
E	DESIGN MANAGER	13	52:33:241
F	MANAGING DIRECTOR	24	53:58:113
G	DESIGN MANAGER	18	66:16:405
H	SENIOR DESIGNER	15	66:16:405
I	DESIGN DIRECTOR	30	54:13:369
J	MANAGING DIRECTOR	26	67:05:757
K	SENIOR DESIGNER	8	61:68:139

consultancies in three major cities of Finland. All consultant worked closely with different clients and participated in acquiring project and settling design briefs before projects were started. The work experience of interviewees ranged from 8 years to 30 years with a mean of 21 years. All interviewees had higher education in industrial design.

The interviews were organized during spring 2018 from February to April. All interviews took place in the premises of consultancy, except one that was done in video conference call for the convenience of the interviewee. Similarly, at one interview, two consultants participated simultaneously due to the convenience of consultancy.

During each interview, the interviewees were asked to share and show material from their latest projects. Seven interviewees agreed to show material from their latest projects, and two interviewees agreed to share the material after the interview. In interviews where the material was only shown, the descriptions of that material were written down to interview journal after the interview. The showed material included presentation slides, offering documents, meeting memos, e-mails and partial pages of the workshop manual. Shared material included brochures, offering documents and visual aids what interviewees crafted when they described material used in client interaction. Interviewees who did not agree to share or show any material were asked to describe the content of the material, use of the material when negotiating with the client, and preparation work for the material. In general, the discussed projects concerned different heavy industry products, commercial products, conceptual development, and workplace planning.

The interviews were conducted in Finnish and audio recorded with the approval of interviewees. When contacting the interviewees and during the interviews, the participants were assured about confidentiality and anonymity of topics discussed in interviews. The length of the interviews ranged from 43 minutes to 67 minutes with a mean of 55 minutes. Generating 9 hours and 12 minutes of material for purposes of analysis. For the purposes of this report, the quotes are liberally translated by the author. During the interviews, participants often used collegial language and Finnish slang, to enhance the understandability of this report the translations were made in more formal English.

### 3.3 Analysing the data

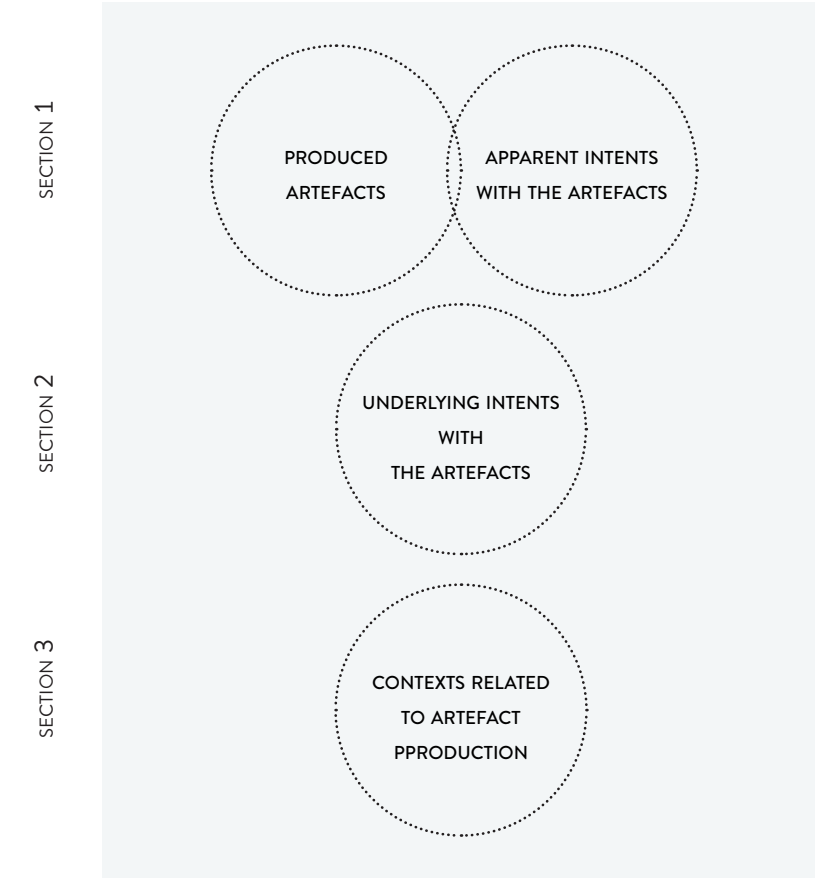
The process of analysis followed the process of thematic analysis as described by Braun and Clarke (2006), which starts with the transcription of data. During and after data collection, the interviews were transcribed at a verbatim level between basic and exact. Meaning that recorded speech was transcribed precisely, including filling words, all dialogue, repetition of the words and explicit expressions of emotions, external disturbances of interviews such as phone calls change of the locations and were added to transcription documents.

After the transcription was produced, the documents were read through several times and coded in computer software. The transcripts were coded first with initial codes which were named to indicate different briefing activities, various interaction points with client and consultants, common considerations when producing the material, purposes to produce material, name of the materials and content of it. These codes were used to preliminary classify the transcript data to seek general logic of the activity.

During this phase, the codes were used as notes to structure the content. After the transcriptions were coded thoroughly, the content of codes was reviewed again in comparison to the research questions. The codes were used as links to move around the transcriptions, the linked content of transcripts was condensed and reviewed again. During those activities, the name of the code was changed more concrete, and some of the codes were deleted in the fashion of relevance towards the research questions. After the initial coding scheme was developed, the analysis focused more on searching the themes from the codes. The quest of search included writing work where the themes were developed by writing them open and reflecting back and forth with the coding scheme and the prior literature presented in the literature review. The work consisted of several phases of writings and production of different diagrammatic sketches. After the themes started to evolve in their state, the themes were reviewed against the transcripts, and more refined naming practice was developed. The last step of the analysis was to report them. During the reporting phase, the themes got their final names and hierarchy.

## 4. Findings

The following three sections of this chapter report the findings of the study. The structure of findings chapter is presented in the figure below (FIGURE 1). The first section reports different identified artefacts that are made and used during the pre-project phase by consultants. Furthermore, this section presents the apparent intents described by consultants when producing the identified pre-project artefacts. The second section focuses on describing the underlying intents expressed by consultants when using the pre-project artefacts. The third section of the findings reports the identified contexts which affect the artefact production.

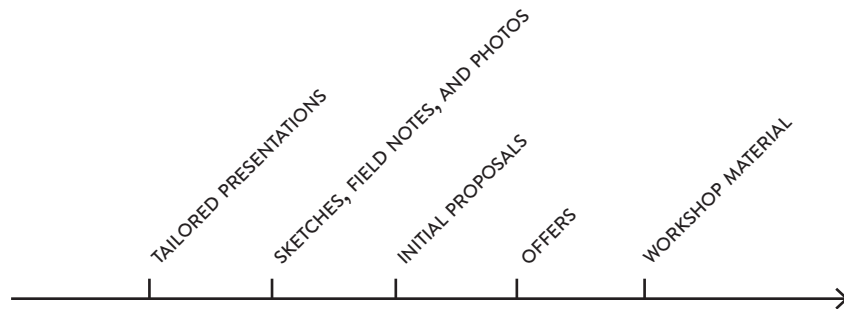


▲ Figure 1: Structure of findings chapter

## 4.1 Pre-project artefacts

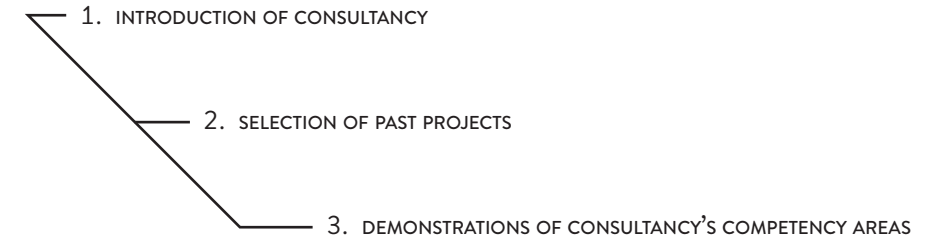
During interviews, the consultants described and showed a variety of different artefacts. Consultants referred to these artefacts also in various names. However, the content and the use of artefacts shared similarities between different interviewees. Based on the use and content of the artefacts during the pre-project stages of a design project, a thematization of different artefacts was developed. These thematized artefacts are: a) *Tailored presentations*, b) *Sketches, field notes, and photos*, c) *Initial proposals*, d) *Offers*, and e) *Workshop materials*. For the purpose of clarity, the reported artefacts are referred onwards by their name.

The artefacts are reported linearly in their typical order of occurrence (FIGURE 2). Nonetheless, it is worth to note that this linear arrangement of artefacts is a generalization of individual situations and practices of different consultancies. In addition, this section describes apparent intents that closely related to the particular artefacts and usage of it. These reported intents are: a) *Promoting expertise and credibility*, b) *Directing the discussions*, c) *Documenting the project related information*, and c) *Securing the sales of design consultancy*.



▲ Figure 2: Typical occurrence of artefact during pre-project phase

*Tailored presentations* were a collection of slides presented from the computer. Often the tailored presentations were prepared in advance when consultants reached to the potential clients. The structure of the tailored presentations generally followed the order presented in the following figure. (FIGURE 3).



▲ Figure 3: Common structure of tailored presentation

The content of the introduction slide was rather straightforward; it presented the consultancy to the potential client. The selection of past projects often included photographs, computer visualizations and photomontages of the project outcomes. The slides that demonstrated consultancy's competency areas included textual and visual material. For instance, three consultants described a practice to include content made in previous projects to their slides. The content regarded the various amount of 'sketches' (Consultant A, G, H), 'product concepts' (Consultant A, G, H) and 'scenario pictures' (Consultant H).

In addition, some of the tailored presentations had more detailed process examples regarding consultancy's work practices. For instance, Consultant A and I mentioned adding a diagram of common work processes to the tailored presentations. Furthermore, Consultant A showed a tailored presentation which presented a specific project in detail process level. The presentation included: project goals, a summary of client given design brief, participants of the project and examples of sketches, foam models, different kind of 3d models and prototypes made during that specific project.



Some of the consultants reported producing in advance new product ‘ideas’ (Consultant\_H, K), ‘market research’ (Consultant\_H) or ‘question lists’ (Consultant\_D, I) which were used alongside or attached as a part of the tailored presentations. In one interview, the agenda slide was also mentioned as a starting point of the tailored presentation.

*Promoting expertise and credibility* was a common intent, mentioned by consultants when discussing the purposes of the tailored presentations. Words such as ‘credibility’ (Consultant\_A) and ‘trustworthiness’ (Consultant\_D) were used by consultants when describing their intents with the tailored presentations. Commonly the tailored presentations were used by consultants for demonstration purposes. For instance, Consultant B mentioned how s/he ‘pile’ past projects to tailored presentations to sell their proficiency through concrete examples. Among interviewees, demonstrating through the project examples was considered a good practice. It opens the ‘benefits’ of consultancy’s work to potential clients in the concrete, and clear manner discussed Consultant D.

*Directing the discussions* was another common intent regarding the discussed the uses of tailored presentations. According to some consultants, the aim with the question list and tailored presentations is to steer the discussion with the potential client towards the new project possibilities and evoke discussion with the potential client regarding the possibilities of different consultant services. For instance, Consultant D reported:

In the best scenario, these discussions (with a client) would resonate to ask a request of the proposal (from the consultancy). (Consultant\_D, text in brackets added by author)

However, third of consultants mentioned that these events of presenting the tailored presentation seldom lead to discussions about potential projects. It might take ‘one or two’ years before any projects took place mentioned Consultant H and continued ‘it is more about setting nets to sea’.

*Sketches, field notes, and photos* appeared later during the pre-project phase when the negotiations with the potential client had already evolved towards a specific project possibility. Many of the consultants mentioned that they often try to set a meeting with a client to discuss more on face to face. Consultant B and L described these meetings as ‘brief acquiring

trips’ or trips to ‘inquire brief’ from the potential client. During these trips, consultants described a practice of making ‘written notes’ (Consultant B, L), ‘sketches’ (Consultant B) and ‘photographs’ (Consultant K, L) when the client presented their current products or premises to the consultants.

*Documenting the project related information* was a repeated intent among consultants when producing sketches, field notes, and photos. In addition, one consultant described an occasion where they crafted a ‘spreadsheet’ (Consultant\_E) with the potential client. The crafted spreadsheet served as an annotation document for an upcoming project. Furthermore, the sketches, field notes, and photos were attached as part of other artefacts by consultants, later when the negotiations with a client evolved further.

*Initial proposals* were artefacts that subset of consultants created after the early project briefing meeting. The initial proposals had many names. For instance, consultants were naming it as a ‘proposal’, ‘solution proposal’, ‘counter brief’, ‘debrief’ or raw version of a ‘project plan’. The naming practice of this artefact not only varied based on practices of consultancies, but also the consultants gave it different names during the course of the interviews.

The initial proposals had many different formats. For instance, sometimes it was either a ‘slide presentation’ (Consultant\_B, D) or ‘textual document’ (Consultant\_L). Furthermore, few consultants reported that the format of the initial proposal could be first ‘pages of an offer’ (Consultant\_C), ‘email’ (Consultant\_C, D) sent to the client or ‘paper sheets’ (Consultant\_C) presented to the client. Commonly the various format of initial proposals emerged after the preliminary project briefing meeting was conducted with a potential client. Furthermore, the content of the initial proposal was solely focusing on to a specific design project.

Some of the consultants described more established practices to produce the initial proposals than others. In cases the initial proposal was produced as an established practice, it generally contained a description of the current client situation and the project goals. In addition, few consultants reported that the initial proposal could contain the suggested project participants and their roles in a project. Most of the interviewees, divided the potential design project into distinct phases that were presented in the initial proposals. For example, Consultant B described the content of the initial proposal:

...then it (the initial proposal) tells that whom we are proposing to the project team from us; then there are the phases of the project, description of the phases, number of hours, and contents what it is done in each phase and what are the outcomes of each phase... (Consultant\_B, Text in brackets added by author)

Commonly, each phase was written out by consultants to describe the specific outcomes and schedule of it to a potential client. Furthermore, some of the initial proposals presented the preliminary cost and work hour estimations. Few consultants mentioned that occasionally the initial proposal contains also 'possible' (Consultant\_C, K) proceeding options and 'benefits' (Consultant\_B, C) to execute the project in a specific way. In addition, one consultant reported practice of adding sketches drawn in an earlier client meeting or different pictures to the initial proposal.

*Documenting the project related information* was a common intent with the initial proposals among consultants. For instance, Consultants L reported how the initial proposal was a combination of a meeting memo and project plan which is sent to the client after the initial briefing meeting.

*Offers* were a more evolved version of the initial proposals, and generally their format and content shared similarities between the initial proposals. Firstly, the offers were made in various formats as initial proposals. For instance, the interviewees described or showed material in the form of textual documents or slide presentations during the course of interviews. Secondly, the offers described the project goals, current situation, project phases, phase descriptions, participants, outcomes of the phases and schedules, as did the initial proposals. However, offers and initial proposals also did have clear distinctions between each other. For instance, Consultant B described that the offers contain 'prices' of consult services and the initial proposal does not. Generally, consultants considered the offer as a more comprehensive artefact which includes the limitations of their work, terms of deliveries and exact prices. As an example, Consultant D described the offer:

In our case, it is a very formal document which is, in practice, the same as the agreement when the client accepts it in writing. (Consultant\_D)

*Securing sales of the design consultancy* was, in general, the primary intent with the offer when setting the agreement regarding the project. An example, one consultant discussed: '...if you think mechanically, the offer equals sales' (Consultant\_K).

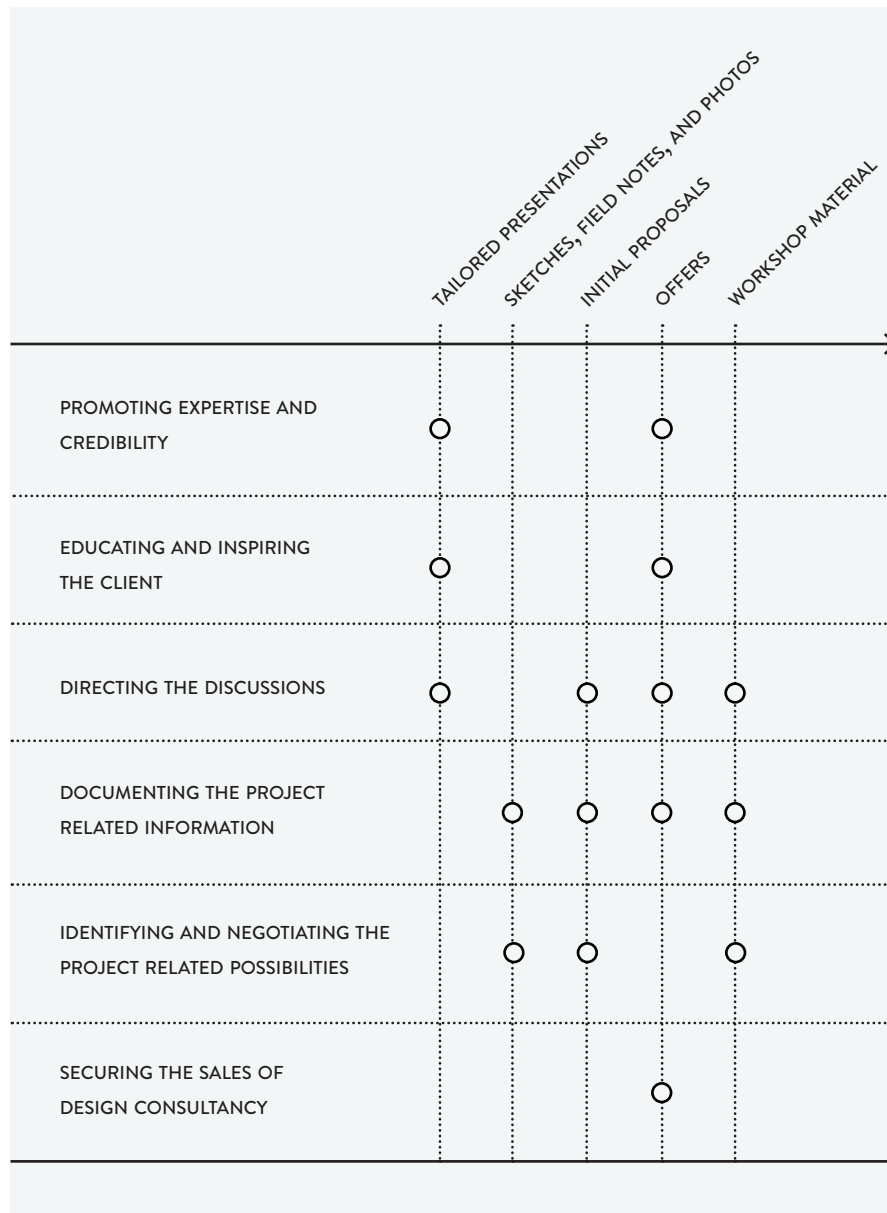
Furthermore, some of the consultants attached promotional content to their offers. For instance, Consultant F, I K and L reported putting a company introduction, examples of past projects and inspirational material to their offers.

*Workshop materials* were produced by some consultants after the client had accepted the offer. The preparational material for the workshop varied among different consultancies. Consultant I reported that their practice involves preparations of workshop agenda, which incorporate the workshop tasks and a list of specified questions. According to Consultant I, the practice ensure that all relevant topics are discussed with the client during the workshop. Consultant G mentioned his practice to gather personal inspirational material when preparing for the workshop. Consultant F discussed that they had developed specific tools for their workshop purposes. In all discussions, regarding the workshop material, the consultants described that outcomes of the workshop are documented and translated by consultants to 'design drivers' (Consultant\_H), 'specifications' (Consultant\_I) for concept work or as a 'brief for sketching' (Consultant\_F).

## 4.2 Intents with the pre-project artefacts

This section reports the more underlying intents that interviewees discussed regarding the use of produced artefacts. This section focuses and deepens the following intents: a) *Promoting expertise and credibility*, b) *Educating and inspiring the client*, and c) *Identifying and negotiating the project related possibilities*. Some of the discussed intents are interrelated, for example, the tailored presentation and the offer shared closely an intent to promote expertise and credibility when consultants described the uses of them. The expressed intentions and their relations to the produced artefacts are presented in figure 4 (FIGURE 4).

*Promoting expertise and credibility* was a repeating intent discussed by consultants. As earlier mentioned, this intent was often related to the uses of the tailored presentations. In addition, a subset of consultants mentioned that offers have similar purposes in a more nuanced manner. For instance,



▲ Figure 4: Identified intents with artefacts during pre-project phase

some of the consultants discussed their practice to attach examples of past projects to their offers. In doing so, the consultants addressed that they were considering unmet stakeholders of the client. According to Consultant F, one reason to consider the unmet stakeholders was to influence buying decision processes of the client:

...because it (the offer) goes anyway through some sort of collegiate decision-making... so it has some material what we have done with past (XX) years, such as references and background material, so others (unmet client stakeholders) can also see what that company is. (Consultant\_F, Text in brackets added by author)

Another consultant mentioned that s/he adds a detailed description of the consultancy's worker's competency areas. The reason to do so was to promote the expertise of consultancy to the client. Consultant K discussed: '... this way the client can see what kind of expertise we have...'. Furthermore, some consultants discussed that the content of the offer implies the proficiency of consultancy to the client:

It is the most important document what we do...because we pack our know-how into small package therein.... (Consultant\_I)

It is the company DNA...because therein we describe our competence... (Consultant\_K)

Occasionally the promotion of expertise and credibility was more of a work to reassure the potential client, rather than promoting the credibility and expertise in the first place. For instance, Consultant A mentioned, that they made a tailored presentation to the potential client to show that they have helped other clients in similar projects and 'convince and reassure' the potential client. In addition, the Consultant B described:

...then if it comes to that we (the consultancy) must reassure that we know something, then we will do those tailored sets. (Consultant\_B, Text in brackets added by author)

Moreover, two consultants mentioned that they seldom rely on tailored presentations because they can hinder the interaction with the potential client. However, the same consultants discussed that they utilize a generic company presentation in case if the: ‘...the client starts to question the competence of consultancy’ (Consultant\_C) or if the client starts to ask specifying ‘questions’ (Consultant\_B) about what the offered consult service means in practice.

*Educating and inspiring the client* was another theme that linked the tailored presentations and the offers together. A subset of consultants mentioned that the tailored presentation has a role of educating the client when building new client relationships. For instance, Consultant D discussed a situation where s/he was using a tailored presentation to demonstrate a complex and challenging project done with a notable client. When doing so, s/he wanted to open the eyes of the potential client about possibilities of design. The tailored client presentation was also used by consultants to ‘open the spectrum of design services’ (Consultant\_B) or ‘introduce new services’ (Consultants\_D) to their current clients.

As previously reported, some of the consultants mentioned to produce new ideas to tailored presentations before any commissions are made between the client and the consultancy. According to the interviewees, there were scattering reasons to do so. For instance, Consultant H discussed that ideas are showing consultancy interest to invest in the client:

...we show to a company that we want to invest in them by making new material. I think it tells about us quite a lot... (Consultant\_H)

The new ideas were also used by Consultant K to attract the interest of the potential client and set up a meeting with them. During the set meetings, the Consultant K mentioned also presenting the other consultant services to the potential clients.

Moreover, some of the consultants made content to the offer which was intended to inspire the client. For instance, the consultants described how they put sketches, rough 3d models or pictures that were somehow related to the potential project. According to consultants, the purpose of these sketches, rough 3d models or pictures was to ‘tease’ (Consultant\_B), ‘inspire’ (Consultant\_K) or make the offer more ‘visually appealing’ (Consultant\_D) to attract client interest.

*Identifying and negotiating the project related possibilities* was a common intent which shaped the use of the initial proposal, workshop material and the sketches, field notes and photos. Firstly, Consultant I mentioned how s/he is giving preliminary tasks for the client to collect information from their behalf. This information gathered by the client is then used later in a workshop. Secondly, the consultants described how the initial proposal was used to ‘confirm’ (Consultant\_B, C, I, L) the understanding about the client ‘requirements’ (Consultant\_B) and ‘expectations’ (Consultant\_L). Further, Consultant B discussed:

... when we are listening to the client, I tend to draw some sketches and stuff to understand the case. So, I put it them under the initial proposal, because then it will be possible to confirm if we have understood correctly... (Consultant\_B)

According to Consultant C, the confirmation also concerned the personal chemistry between consultant and potential client. Consultant C mentioned that if there is no ‘common tune’ between client and consultant, it might be wise not to pursue further in that specific project. In addition, Consultant F mentioned, the importance of personal chemistry between consultant and client when organizing the potential design projects.

Secondly, the initial proposal was used to suggest not only different proceeding options for the project but also how the outcome of the project could be made. For instance, Consultant B discussed how s/he uses sketches in the initial proposal to explain to the client about the design possibilities.

Thirdly, the initial proposal was used to gather more specified feedback from a client. Some of the consultants even encouraged the clients to give more focused feedback on the phases of the potential project. For instance, Consultant B described that s/he foster the client feedback by leaving out exact prices and terms of deliveries on purpose from the initial proposal. According to Consultant B, it eases the client give the feedback before the offer is set. Other consultants also showed tactics regarding elicit information from the client. These tactics are discussed in the next chapter.

### 4.3 Contexts of artefact production

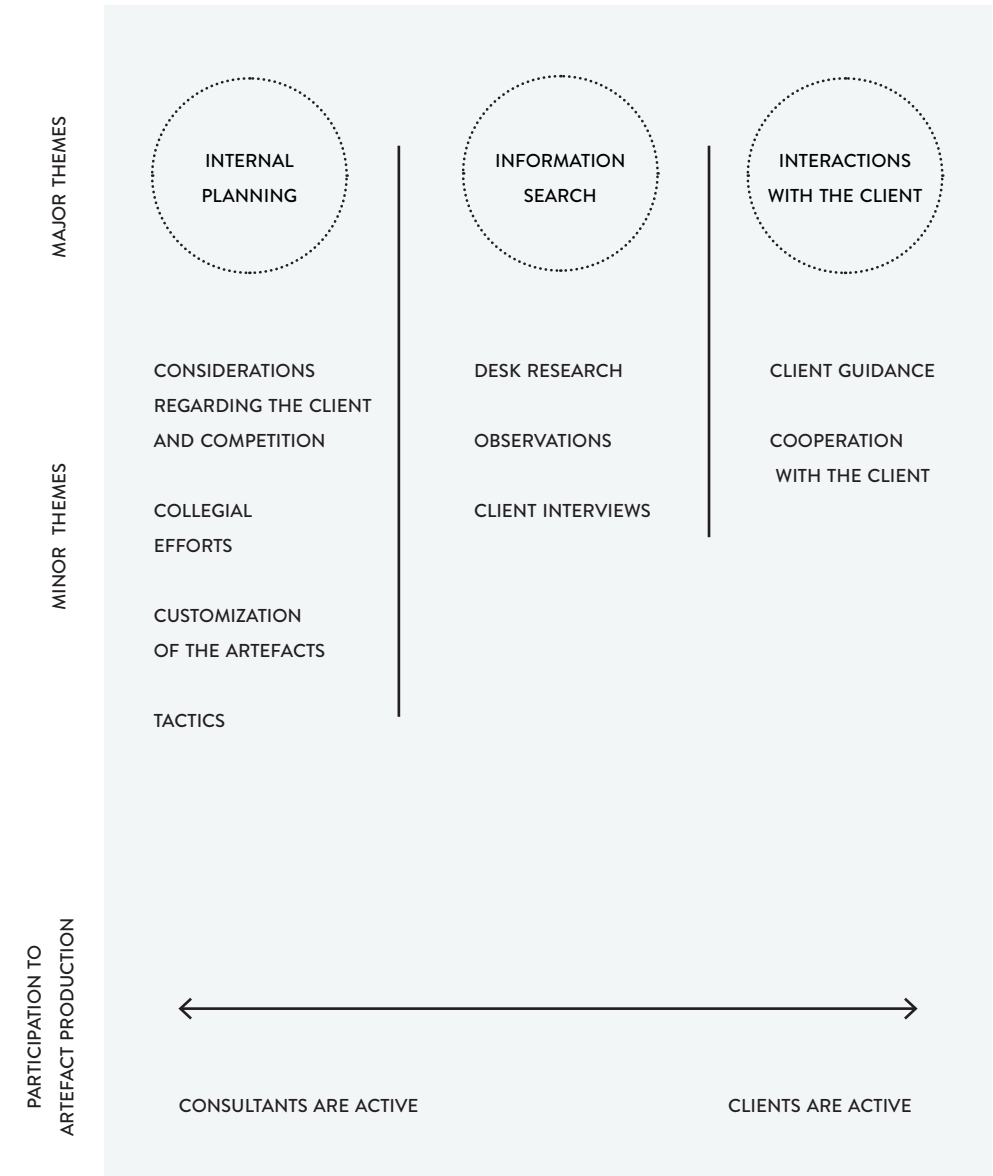
This section presents three thematic contexts that affect artefact production during the pre-project phase. Furthermore, this section aims to draw more textured picture regarding the various concerns and reasonings behind the artefact production during the pre-project stage. The contexts were identified during the process of analysis when interviewees described their taken actions, practises, and considerations related to the artefact production. The findings are divided into three major themes. These themes are: a) *Internal planning*, b) *Information search*, and c) *Interactions with the client*.

These three major themes have nine subthemes. The themes and their sub themes are visualized in figure 5 (FIGURE 5). The theme of internal planning reports considerations expressed by interviewees when producing different artefacts. The theme of information search report activities described by consultants when identifying project related information and its role in artefact production. The theme of interacting with the client describes the forms of client participation in relation to artefacts production during the pre-project phase. In addition, figure 5 shows the consultant - client activities in relation to the contexts of artefact production. This categorisation is based on the mentions of consultants during the interviews.

#### Internal planning

The major theme of internal planning focuses on describing general considerations reported by interviewees when producing artefacts. The theme Internal planning has four different minor themes that were often inter-related to each other during the pre-project phase. These minor themes are: a) *Considerations regarding the client and competition*, b) *Collegial effort*, c) *Customization of the artefacts*, and d) *Tactics*. These minor themes are described in the following paragraphs in a more detailed manner.

*Considerations regarding the client and competition* was an occurring topic, when consultants were discussing about client relationships. During the interviews, the consultant pointed various considerations regarding the client relationships and building of it. For instance, certainty regarding commitment of the client affected artefact production in two opposite manner. It either challenged or helped it. Most evidently, the concerns regarding client



▲ Figure 5: Identified contexts related to the artefacts production



commitment were related to the production of the offer. As an example, Consultant I mentioned ‘making a simpler’ offer when s/he has concerns that the client is more scouting different possibilities, rather than starting a design project with the consultancy. According to Consultant I, they also have had prior experiences where the client has used the produced offer to ask a quotation from elsewhere. At the same time: ‘.. the offer should be a specific document about what we are doing and what the client gets’ described Consultant I his/her concerns. In contrast, when the consultants were relatively confident that the client would accept their offer, it affected the format of the offer. For instance, Consultant L reported when s/he was showing a plain textual offer:

This must have been a case, where we did have a quite certain feeling that we are taking this case. Moreover, because this was not a competition situation, so we did not have any presentational material attached to the offer. (Consultant\_L)

Strategic value of the client and competition was one reason among consultants to make more visually appealing or comprehensive offer for a potential client. As an example, Consultant L reported a situation where they did free design work to ‘support’ the offer because the value of the potential client was considered significant from the perspective of consultancy.

Often familiarity and previous shared experiences with the client eased the artefact production by reducing the time and effort put to the artefacts. For instance, Consultant E discussed:

...It (the initial proposal) can actually be, in case we know each other well, an oral estimate that this takes x the amount of time (Consultant\_E, Text in brackets added by author)

In addition, few consultants mentioned that the client relationships are of often imprinted to a specific consultant. For instance, Consultant F and L mentioned that when the contact person either organisation is changing the employer, there is a risk that the present consultancy is also changed. In order to mitigate the risks of imprinted relationships, for instance, Consultant L discussed that they tend share offers internally between colleagues to distribute project related information in order to make sure that one person

does not carry all the client and project related information. According to Consultant L its a common practise in the field.

*Collegial efforts* towards artefact production was a common practice among consultants. For instance, Consultants G, H, and L mentioned having the practice of arranging an internal meeting with the colleagues. In this meeting, different experiences regarding the potential client business field were shared. Moreover, Consultant I discussed how s/he confirms the language of the offer and tailored presentation with the help of a colleague. According to Consultant I, the aims is to improve understandability and avoid the professional language used in the offer or tailored presentation.

*Customization of the artefacts* was a general practice among consultants. During one interview, one consultant showed a leaflet that described a pre-planned project with a price. However, according to that consultant, these pre-planned projects are very rarely done or sold. Moreover, the common practice among all consultants was to customize the content of the artefacts in the case by case manner: ‘...otherwise, there’s no good fit for client...’ mentioned Consultant I, when s/he was describing the underlying reasons of the customization. The customization affected differently to particular types of the artefacts. For instance, the tailored presentations were mostly customized by selecting appropriate examples of past projects for a specific client. In doing so, the similarities of potential client business field and selected project examples were considered by consultants.

In contrast, the content of the offer was customized based on information provided by the client. According to some consultants, the customization of the offer was occasionally based on ‘anticipation’ (Consultant\_K) when the client had not provided enough information for the consultancy. In addition, two consultants reported that production of the offer is already work of design either in terms of project planning or the products of it. For instance, Consultant B mentioned that in order to make an offer to a potential client s/he has to design the product to some extent. By doing so, s/he could estimate the amount of work regarding the potential design project.

The practice of customization also had pitfalls. During interviews, the consultants described occasions when too specific content for artefacts was produced too early or when anticipating too much with inadequate information. For instance, Consultant B discussed how: ‘...the client can cling to the wrong thing...’ when presenting too detailed product visualization during the pre-project phase. Consultant F mentioned that showing select-

ed project examples can steer the client attention to ‘wrong things’ and thus challenge the agenda of the pre-project meeting. Furthermore, Consultant D described a meeting where s/he had prepared by selecting past project examples from their different product design projects. During the meeting, the client mentioned that they are interested in conducting a service design project instead of a product design project.

*Tactics* developed by experienced consultants. During the interviews, four consultants described patterns when explaining the uses and reasons behind the certain artefacts. Although these patterns occurred differently, they shared a common goal to mitigate the lack of project related information. For instance, Consultant B used the initial proposal continually to gather feedback from the client and fostered that by leaving out exact prices. Another tactic related to the initial proposal was discussed by Consultants C and I. According to them, the initial proposal can be used in a first client meeting if the client was approaching the consultancy with a clear understanding about their needs.

The offer had also specific tactic developed. For instance, Consultant I emphasized the wording ‘this offer is based on given information’. By doing so, s/he discussed that the offer could be revisited and adjusted after the procurement, in cases where the design project is taking a new and unexpected direction.

One experienced consultant reported a more phased tactic when negotiating with the potential client because of they: ‘...seldom get a good brief from a client...’ (Consultant\_F). The phased tactic started by gathering enough information from the client to make an initial proposal. The initial proposal was then used as a stepping stone to set up a face to face meeting. After the meeting, the initial proposal was adjusted based on the client feedback. Then, if the client had accepted the offer, a workshop was arranged to get a ‘brief for sketching’ (Consultant\_F) from the client.

#### Information search

The major theme of information search reports different information acquiring practices described by all consultants. The theme of information search has three different subthemes: a) *Desk research*, b) *Client interviews*, and c) *Observations*. In all interviews, the information search preceded the artefact production.

*Desk research* often preceded the production of tailored presentations. According to consultants, the desk research focused on eliciting information regarding the client business environment. For instance, the consultants reported seeking information regarding the client ‘size’ (Consultant\_A, I), ‘competitors’ (Consultant\_G) and the ‘current product and service offering’ (Consultants\_I, G, H) of the potential client. Additionally, the past ‘engagements’ (Consultant\_B, D) with the design services were identified by consultants. When the consultants were contacting a specific person from the client company, the occurring practice was to search for information through internet regarding the person’s ‘position’ (Consultant\_D, I) in the client organization.

*Client interviews* generally happened when a meeting with a potential client was set. As a preparation work, some of the consultants made a question list, and others were relying more on their experience. Generally, the interviews had a different role depending on the stage of the pre-project phase. For instance, when the client was met for the first time the role of the interview was to scout different project possibilities. Consultants I mentioned that s/he purposefully ask ‘stupid questions’ from the potential client to open new development possibilities and directions.

When the discussions with the potential client evolved to the stage of a specific project, or when a client showed interest towards the consultancy in a first place, setting a face to face meetings was a preferred option among the consultants. When describing the meetings, the consultants emphasized the importance of ‘listening’ (Consultant\_B, C, D, F, L) what the client has to say, so that the consultant can ask more ‘specifying questions’ (Consultant\_B, C, E) regarding the potential project. The topics of questions mentioned by consultants often related to the outcome of the project. For instance, Consultant B described the questions made during the meeting:

...Where is the product used? How is it used? What are the relevant things in it? What stakeholders are related to it? Is the client selling it straight to end customer or is there some intermediary involved?... (Consultant\_B)

According to Consultant B, the client responded to these questions not only by telling but also showing videos, pictures of the different products.

Other topics of the discussions mentioned consultants were ‘client history’ (Consultant\_E), ‘current situation’ (Consultant\_E), ‘market segments’ (Consultant\_C) and ‘end customer needs’ (Consultant\_C).

*Observations* were one identified subtheme of the information search. During interviews, some of the consultants described that they document their observation when visiting the client premises. For instance, Consultant K discussed how s/he went with a colleague to meet a potential client and photograph the client premises to ‘audit’ the current situation. Consultant B described the activity of making drawings to the notebook when visiting the client. Additionally, Consultant L discussed an excursion done on client premises to study their products. According to Consultant L, the excursion aimed to elicit enough information to produce an offer. The information was captured in the form of photographs and notes. In all described situations, information obtained by observations were used as an aid to producing the initial proposal or offer for the potential client. In a few cases, the taken pictures and sketches were attached as part of the offer.

#### Interactions with the client

The major theme of interactions with the client reports the mentions of consultants regarding the client participation in the artefact production. The theme of interacting with the client has two different subthemes: a) *Guidance of the client*, and b) *Cooperation with the client*. The difference between these two subthemes is related to artefact production and the client role in it.

*Guidance of the client* was affected by the artefact production variously. In some interviews, the consultants reported clients who explicitly asked a certain kind of artefact. In some cases, the client guided the consultancy through the tendering process. In doing so, the client affected the artefact production of consultancy. For instance, Consultant C described a situation with a newly met client, who wanted an initial proposal from the consultancy. After the consultancy produced the initial proposal, it was reviewed and developed to offer based on client feedback:

...(the client) wish was that they could get a kind of initial proposal which has the costs and description of what the project could be, and then we were like yes let’s do that... (Consultant\_C, Text in brackets added by author)

...and then we sat in this particular room and talk through it (the initial proposal). During the discussion, the client very smartly asked some things about it, made some clarifications, and expressed how s/he would proceed. Then we agreed that since now we (the client and consultant) have the same view about the topic, we (the consultancy) are doing a more detailed opening (the offer)... (Consultant\_C, Text in brackets added by author)

Furthermore, Consultant K described a project where the client had helped the consultancy to adjust the content of offer properly because the field of the client was new and challenging to the consultancy. In addition, some consultants reported that the clients were occasionally asking specific format of the artefact for their purposes. For instance, Consultant D mentioned how they made an initial proposal as a slide presentation because the client needed to show it to his/her colleagues. In addition, Consultant I mentioned a client who specifically wanted a ‘Word document’ for his/her purposes from the consultancy.

*Cooperation with the client* when producing artefacts was most evident during the design workshops. For instance, Consultant F described the course of the workshop:

...and then they (the representatives of the client) got excited and rushed to flipchart (to draw) that yes that we do in this and that way. (Consultant\_F, Text in brackets added by author)

Other consultants also reported preliminary meetings that turned to an ‘ideation workshop’ (Consultant\_D) or ‘vivid’ (Consultant\_C) discussions that explored different project possibilities with the client. In one occasion, the consultant crafted a ‘spreadsheet’ (Consultant\_D) with a client for the following project purposes. In addition, Consultant I mentioned how s/he is giving preliminary tasks for the client to collect information from their behalf. This information gathered by the client is then used by consultants later in a workshop.



## 5. Discussion and conclusion

This chapter summarises the findings of this study. The research questions are revisited and discussed. In addition, the strengths and limitations of this study are considered, and suggestions for further studies are presented.

### 5.1 Produced pre-project artefacts

The first question in this study sought to describe that: *What kind of artefacts does design consultants produce when preparing to negotiate with the client about the design project?* As an answer to this question, the present study provides a taxonomy (FIGURE 2) of different artefacts used by design consultants when interacting with potential clients during the pre-project phase.

In general, the present findings suggest that the artefacts are evolving during the pre-project stage. For instance, the sketches, field notes, and photos were attached as a part of the initial proposal which then evolved to an offer. Furthermore, the tactics mentioned by design consultants suggests that the initial proposals are used flexibly during the pre-project stage. In general, therefore, it seems that the briefing practice in design consulting is continuous and iterative by nature. Therefore, these findings further support the idea of a continuous briefing process presented by Blyth and Worthington (2001).

One interesting finding of this study is that the content of the initial proposal and the literature definition of the design brief share similarities between each other. As mentioned in literature review, the extant briefing literature uses the words 'brief' or 'design brief' commonly to refer documents that contain information regarding the project goals, objectives, timeframes, roles and responsibilities (e.g., Blyth and Worthington, 2001, p. 69; Phillips, 2004, pp. 133–160; Ulrich and Eppinger, 2012, pp. 36–50).

The present findings show that the content of the initial proposal contained a description of the current client situation and the project goals. In addition, some of the initial proposals had content of the suggested project participants and their roles in a potential project. Moreover, the word 'brief' was often used among consultants to refer to an artefact or a meet-

ing, which was related to the client one way or another. In this respect, the findings suggest that the word 'brief' tend to carry meanings related to the client among consultants. Furthermore, the present findings imply that the role of the design brief, one form or another, is a starting point to negotiate project possibilities with the client. These observations may support the interpretation, that the design briefs are seldom given such in the field of design consulting. In contrast, the findings suggest the design briefs are negotiated with the potential client or developed by design consultants. Prior studies have also made similar observations (e.g., Ravasi, Marcotti and Stigliani, 2008). Another possible explanation is that the authorship of the artefact affects the naming practice of artefacts.

Another interesting finding was that the offer is an important artefact among consultants. It is evident that it is used to secure sales and the intermediate states of the offer are used for briefing purposes when negotiating the design projects. However, prior studies have shown (e.g., Park-Lee and Person, 2018) that there is a briefing gap after the design projects are commissioned. The present findings indicate that some of the design consultants are arranging workshops to identify project related information after the design project is commissioned. Moreover, few interviewees reported, that offer was revisited and adjusted by consultants after the course of the design project was set. This inconsistency between earlier observations may be due to reasons that the design consultants might have more various briefing practices, which are used to variously to the needs of the specific design project. Another possible explanation is that the briefing practices in design consulting are based on the personal experiences of consultants and thus some of them have developed practices to overcome the gap observed by Lee and Person (2018).

### 5.2 Intents with the pre-project artefacts

The second research question set for this thesis was: *What kind of intents does design consultants have when using the produced artefacts?* In general, the present findings regarding the intents of consultants suggests that briefing and sales are connected during the pre-project stage. For instance, figure 4 (FIGURE 4) shows that the themes of identifying project related information and documenting project related information are closely linked to

literature definition of briefing (e.g., Duerk, 1993; Blyth and Worthington, 2001; Peña and Parshall, 2001; Phillips, 2004; Jensen, 2011; Paton and Dorst, 2011; Ulrich and Eppinger, 2012). In contrast, the themes of promoting expertise and credibility, and securing the sales of design consultancy can commonly understand as sales related activities. These findings are in line with recent studies indicating that briefing and sales are connected during pre-project stage (e.g., Park-Lee and Person, 2018). For instance, the artefacts, such as tailored presentation and offer, occurred at different times during a pre-project stage, yet they were used with a similar intent to promote the expertise and credibility to the potential client.

One interesting finding was that interviewees did not report sales related intent when using the initial proposals. Moreover, the intent regarding the initial proposals was related to the briefing activities. Additionally, some of the consultants mentioned that the use of tailored presentations could hinder and challenge the interactions with a potential client. Furthermore, some of the experienced consultants reported that activities to produce design solutions in advance could have pitfalls and steer the pre-project negotiations to side tracks. In contrast, the competition with other consultancies and strategic value of a client affected to the produced artefacts in terms of pre-made design work. It is possible, therefore, that the selling and briefing are highly sensitive and nuanced activities during the pre-project stage when projects are set and discussed.

In addition, it is possible to hypnotize, that more detailed and defined presentations regarding the possible project outcomes are hindering the briefing if presented too early during negotiations of the design projects. Another possible explanation is that the experience of consultants affects the briefing practices by making it more nuanced. Earlier studies have also been reported observations regarding the prior experiences and know-how are connected to ways conduct briefing in the field of architecture and construction (e.g., Barrett, Hudson and Stanley, 1999).

Another interesting finding of this study was the theme of educating and inspiring the client. Several earlier studies (e.g., Kurvinen, 2005; Hakatie and Ryyänen, 2007; Bogers, van Meel and van der Voordt, 2008; Alavuotunki, Halme and Salminen, 2015; Park-Lee and Person, 2018) have mentioned, that the various proficiencies to buy design services, challenge the greater use of design services.

Furthermore, Lee and Person (2018) have reported that design consultants have faced this challenge in their day to day practices and developed practices to secure sales and acquire enough project related information.

In the same way, the present findings suggest that design consultants have developed practices to mitigate the lack of project related information. Firstly, the uses of tailored presentations for educational purposes is rather self-explanatory. Secondly, the findings suggest that some of the consultants have been developed tactics and practices to mitigate the absence of project related information and elicit information from the clients during the pre-project phase. The reasons to develop such tactics can be various. However, for instance, Consultant F reported explicitly seldom getting a good brief from the clients. Therefore, it may be the case that these developed tactics do have a connection to mitigate the challenges regarding the different understandings of design.

### 5.3 Various contexts of artefact production

The third research question set for this thesis was: *What kind of contexts does affect the production of the artefacts?* This study shed light on the context related to the artefact production during the pre-project stage (FIGURE 5). In general, it seems that the process of the briefing benefitted from the close relationship with the clients, in terms of the reduced artefacts production. Additionally, few consultants reported that client imprint to specific persons of consultancy. Similar findings regarding the personal relationships and their benefits have been made prior studies. For instance, Bruce and Docherty (1993) suggest that the long relationships develop a common language between the consultant and client and thus eases the briefing. However, the findings imply that the close relationships between client and consultant have also risks. Moreover, the few consultants mentioned mitigating these risks by sharing information inside the consultancy.

In general, the present findings imply that the consultants are putting effort to build and cultivate the client relationships during the pre-project stage. For instance, one interviewee described a collegial practice to refine the language of artefacts used with potential clients to ease the interaction. In addition, the findings show that the client guided and participated in the

artefact production during the pre-project stage. Prior studies have reported similar findings regarding client guidance (e.g., Park-Lee and Person, 2018). For instance, Lee and Person (ibid) reported that the design consultants preferred the 'client stewardship' during the pre-project stage. Therefore, it may be possible to hypothesise that fostering the client participation in artefact production is a way to increase client enactment by consultants, and thus a way to build longer client relationships.

A survey study conducted in Italy reported that cooperative development activities are done between consultants and clients to produce design briefs (Ravasi, Marcotti and Stigliani, 2008). The present findings share similarities between the earlier observations. For instance, during the interviews, the consultants reported conducting brief acquiring trips which led to the production of initial proposals and later to the offers, after the feedback round with the potential clients. In general, these reported activities could be considered as cooperative. It can thus be suggested that the design consultants in Finland show similar practice than their colleagues in Italy, to negotiate a common ground during the pre-project phase.

Moreover, the present findings suggest that design briefs are rarely 'nailed down' as such. (Bruce and Morris 1994, p.595) In this respect, the descriptions of Bruce and Morris regarding the non-negotiable design briefs are in contradiction to the findings of this study. This inconsistency between earlier observations may be due to that the briefing practice, in the field of design consulting, has developed within 24 years.

One interesting finding was that the customization of artefacts was a distinctive and widespread practice among consultants. In general, there are other ways to arrange consultant services such as different forms of design sprints, that focus on repeating the same process with all clients. A possible explanation for this might be, that the practice of customization is related to the topic of problem-solving activities discussed in the literature review. For instance, the findings show that the artefacts evolved and each other during the pre-project stages as the project related information increased. In addition, consultants sought information to produce a project plan. This observation may support the hypothesis that one 'ill-defined' problem to solve during the pre-project phase is that how to organize a design project in this particular case. Despite these indications, a question remains that does the co-evolutionary problem-solving activities emphasize the practice of customization in the design profession?

In general, the finding of this study suggests that the process of artefact production could be interpreted equally important act regarding the use of the artefacts during the pre-project phase. For instance, the consultants mentioned interacting with a client when producing the offer to negotiate and identify project-related information with various means during the pre-project phase. In addition, consultants showed various information search practices during the pre-project phase which affected the artefacts. Therefore, it seems that the production of the artefacts for briefing purposes can be understood as essential skill sets in design consulting to facilitate briefing. Furthermore, the current findings suggest that the consultants are carrying a significant responsibility to conduct briefing when design projects are set with potential clients. However, it is important to bear in mind the possible bias regarding the significant responsibility of the consultants since this study has a focus to describe the perspective of consultants and not the roles and responsibilities of the client.

## 5.4 Limitations and reliability of the study

During interviews, the discussed projects concerned different heavy industry products, commercial products, conceptual development, and workplace planning. Commonly, these discussed projects can be considered as traditional industrial design projects. In general, qualitative research is tied to interviewees current situation and time (Yardley, 2000). That said, the findings might not be generalized all briefing practices that industrial design consultants conduct during the pre-project stage. For instance, the interviewees described common industrial design projects, which were related to the private client sector. In that respect, the briefing practices in service design and public sector can vary because of governmental practices and legislation, as authors such as Park-Lee and Person (2018) suggests.

In spite of the amount of interviewees, the present findings can be considered to describe at least a glimpse of the general industrial design consulting briefing and artefact production practices, because in Finland the field of industrial design consulting is rather small. Furthermore, it should be considered that, although eleven interviews constitute a relatively small sample from a quantitative research perspective, the descriptions provided by all the interviewees showed a relatively high degree of consistency.

The scope of this study set limits to generalizing the findings to the broader field of design, such as architecture and visual communication. For instance, the guidebook literature in architecture discusses the uses of many briefs to various stakeholders relating to complex construction projects (Blyth and Worthington, 2001). In contrast, the guidebook literature in visual communication focuses on the use of one brief (Phillips, 2004). Moreover, the nature, scope, and duration of the projects vary radically in the different field of design. However, Bogers, van Meel and van der Voordt (2008) have reported that architects would prefer to negotiate the design briefs with clients together. That said, the findings might indicate that there are some common briefing 'ideals' between different fields of design.

In general, by describing the research process precisely the reliability of the study is increased (Tuomi and Sarajärvi, 2013, pp. 138–139). The research process was described in a detailed manner in the method section. Furthermore, this study provides the additional 'proof quotes' (APPENDIX 5) to open the process of analysis and theme identification (Pratt, 2008). Nonetheless, it is worth to note that the selection of the method affects the nature of the findings and set limitations to the conducted study. The findings do not represent how the briefing is conducted directly and artefacts used as such during consultant-client interactions. However, the results shed light on intentions and underlying reasons to create and use artefacts for purposes of the briefing during from the perspective of design consultants.

In general, the thematic analysis presented by Braun and Clarke (2006) felt a good way to analyze the collected data and was considered suitable to study the artefact production and briefing in pre-project settings. Furthermore, the method selection felt approachable to use by an author whose experience in qualitative analysis and research is limited. In addition, when considering the reliability of the study, it is worth to bring up the authors novice skill level regarding qualitative research. In general, this was a learning process to the author which included multiple steps back and forth during the process of analysis.

The topic of briefing during the pre-project stage was a challenging topic to study. For instance, the confidential nature of the briefing made the accessing to some artefacts impossible. However, the findings of the study benefitted from the openness and willingness of interviewed consultants to share their experiences and related artefacts from their practice. That said, during the interview process the anonymity and privacy were paid attention rigorously. For example, the participants were assured about confidentiality

and anonymity of topics discussed when recruited. After the conducted interview, the author deleted the related emails and calendar marks. Furthermore, during the interviews, the informants were not pushed to speak about the topics that felt too confidential. Moreover, when reporting the present findings, the nonymity of interviewees was considered multiple times, in terms of what could be reported and how to report it to secure the anonymity. The reliability of the present finding would have benefitted from the feedback round from the interviewees. However, the timeframe of this thesis did not allow such actions.

## 5.5 Conclusion and future suggestions

The purpose of this master's thesis was to examine and describe the role of artefacts and their relations to the briefing from the perspective of design consultants. In doing so, deepen the knowledge regarding briefing conducted in design consulting. The most apparent finding emerged from this study is the taxonomy of pre-project artefacts. Furthermore, the present findings suggest that design briefs are commonly developed together with the potential client and rarely given as such. Moreover, the findings suggest that briefing and artefact production is closely connected to the development of client-consultant relationships and sales during the pre-project stage.

The contribution of this study can be considered from three perspectives. Firstly, by identifying and naming the artefacts used in the pre-project phase, the artefacts can be discussed and developed further. Secondly, when the artefacts and practices related to briefing are identified in design consulting, this may help students and educators to focus on the skills to produce these materials and practices. For instance, the skills to produce offer or plan a design project with the client seemed rather important in the field of design consulting. Given that, different competencies are required as one grows in his or her practice (e.g., Lawson and Dorst, 2013; Dziobczenski and Person, 2017). Thirdly, the findings of this study can be used by design consultants as a point of comparison when evaluating and planning new artefacts for briefing purposes.

To contextualize further the briefing practices in the domain of industrial design consulting longitudinal and ethnographic studies could create a more deepen and textured picture regarding the briefing practices of it. Especially the tactics mentioned and developed by experienced consultants, seems fruitful topic to study and explore in future studies. However, the confidential nature of the briefing in design consulting makes the accessing to actual briefing situations a challenging topic to study and thus a concern of the future studies.

One topic raised during the course of this study was the context of strategic design, which can be considered as complex practice involved with multiple stakeholders and views. One interesting idea would be to look further at how the briefing is conducted in that particular context. The author's assumption is that the importance of briefing grows when entering complex and uncertain settings which involve cooperation with various stakeholders.

Another interesting idea raised when conducting this study was that should the briefing process interpreted as a set of different modes of eliciting, presenting and documenting project related information, rather than a continuous process, which interacts and specifies the ill-defined problems during the course of a design project. Naturally, these views do not exclude each other. However, by interpreting briefing activities as modes, the arrangements of it could be structured and analyzed further at future studies.

Present and prior studies suggest that the briefing, sales, and personal relations are connected In the domain of design consulting (e.g., Bruce and Docherty, 1993; Hakatie and Rynänen, 2007; Park-Lee and Person, 2018). In this respect, the studies of buyer-seller relationships in the KIBS industry could open new directions to the briefing practises in design consulting. For instance, Aarikka-Stenroos and Jaakkola (2012) draws a connection between different contexts of value creation, joint problem-solving activities of buyer and seller, and solution orientedness to either foster or hinder buyer-seller relationships due to reasons of information sharing and distribution. Therefore, it seems that the topic of briefing could be closely related to the domain of buyer-seller relationships and value creation. Given that the various artefacts produced by design consultants are essentially a means to communicate.

In general, the briefing has a close connection to the information production and seeking. Therefore, by approaching the briefing, for instance, from the perspective of the sense-making methodology developed by Dervin (1998), the information seeking practices of design consultants could be approached and their information needs identified, and new solutions developed. Furthermore, the tactics developed by experienced designers regarding briefing and artefact use could be identified, and the reasons behind understood. Therefore, I end this master's thesis with the hope that it would inspire to do more research on the topic of briefing in the field of design consulting. Finally, I would like to thank the interviewees for openness and willingness to participate in this study. Moreover, I would like to acknowledge my thesis supervisor and advisor for giving feedback, patience, and guidance during the whole process of the master's thesis.



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## Appendix 1

### RECRUITMENT LETTER IN ENGLISH

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To whom it may concern

My name is Mikko Latomäki and I'm conducting my master's thesis in Aalto university in the department of collaborative and industrial design. I'm approaching you with the interview request in mind, because your consultancy has been doing lot of important work in the field of design.

I would like to interview you or one of your designers who interacts with clients in his/her work. The topic I'm examining for my master's thesis is how different designers are preparing and using different kind of materials in early client meetings during design project. All the interviews are treated confidentially. You, nor the agency will not be revealed in the final publication. In addition, I will send the the final publication for your purposes.

The interview requires approximately 60 minutes of your time. I hope we can set a time for meeting when it is best suitable for you. If you have any questions, please don't hesitate to contact me.

Best regards

Mikko Latomäki

## Appendix 2

### RECRUITMENT LETTER IN FINNISH

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Arvoisa vastaaja

Minun nimeni on Mikko Latomäki ja teen maisterin opintojeni loppu-työtä Aalto yliopistolle. Opintoni olen suorittanut Muotoilun osastolla Yhteissuunnittelun ja Teollisen muotoilun koulutusohjelmassa. Lähestyn Teitä haastattelupyynnön merkeissä, sillä toimistonne on tehnyt muotoilun saralla paljon merkittävää työtä.

Haen haastatteluun kokeneita suunnittelijoita, jotka ovat mukana aloittamassa projekteja asiakkaiden kanssa. Maisterin työni aiheena on tarkastella, miten suunnittelijat valmistelevat asiakastapaamisiin aineistoa ja miten he hyödyntävät tuota aineistoa näissä tilanteissa. Haastattelu toteutetaan anonymisti, joten haastateltavien tai yrityksenne nimeä ei tuoda julki missään vaiheessa prosessia. Lähetän Teille myös kirjallisen kopion työstäni raportin valmistuttua.

Haastattelu vaatii arviolta aikaa noin 60 minuuttia. Toivon, että Teille sopisi tämä haastattelu ja voisimme sopia sopivan ajankohdan ja paikan haastattelun toteuttamiseen. Annan mielelläni myös lisätietoja tutkimuksesta.

Ystävällisin terveisin

Mikko Latomäki

## Appendix 3

### INTERVIEW GUIDE IN ENGLISH

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#### BASIC INFO (10 MINUTES)

1.) Could you please introduce yourself and your role in (the name of the design consultancy)?

- 1.1 How long have been in the field (of industrial design consulting)?
- 1.2 What is your day-to-day responsibilities in (design consultancy name)?
- 1.3 Do you participate in establishing contact with new clients?
- 1.4 What do you normally do?
- 1.5 What is your responsibilities?
- 1.6 Do you participate in meetings with clients for potential projects?
- 1.7 Do you work alone? or are you doing client meetings together with anyone else from (design consultancy name)?

2.) Is there new a new client meeting coming up soon?

#### TOPIC A (25 MINUTES)

3.) When was your last client meeting discussing about a new project?

4.) Can you tell me a little bit about this client?

- 4.1 What do they do?
- 4.2 Why did they approach you or why did you approach them?

5.) Where does the project discussed in the meeting sit in the product development of the client company?

6.) How did you (or your agency) prepare for this meeting?

7.) Could you show me what the materials you used in this meeting?  
(It can be anything, presentation slides, notes, A4 sheets ...)

- 7.1 What does the material look like it does?
- 7.2 Why was it used?
- 7.2 When was it prepared/created?

8.) Was there something that emerged during the discussion that you did not anticipate?

9.) Did you negotiate on something or anything on meeting?

10.) What are the next steps?

#### TOPIC B (25 MINUTES)

11.) Is there a new, similar meeting coming up soon?

- 11.1) What are you preparing for that meeting?
- 11.2) What kind of client is that one?
- 11.3) Why are you preparing it? Why that way?

12.) What do you? What type of material do you prepare/use and why?

# Appendix 4

## INTERVIEW GUIDE IN FINNISH

### PERUSTIEDOT (10 MINUUTTIA)

- 1.) Kertoisitko itsestäsi ja roolistasi (toimiston nimi):lla?
  - 1.1 Kuinka kauan olet toiminut muotoilukonsultoinnin parissa?
  - 1.2 Millaisia ovat sinun päivittäiset rutiinit työssäsi?
  - 1.3 Osallistutko uusien asiakkaiden hankintaan työssäsi?
  - 1.4 Mitä tuolloin normaalisti teet?
  - 1.5 Mitkä ovat vastuualueesi?
  - 1.6 Osallistutko asiakastapaamisiin, jossa keskustellaan uusista projekteista?
  - 1.7 Teetkö töitä yksin vai osallistuuko joku toinen tapaamisiin kanssasi toimistolta?

- 2.) Onko sinulla tulossa pian uutta asiakastapaamista?

### AIHE A (25 MINUUTTIA)

- 3.) Milloin sinulla oli viimeksi asiakastapaaminen, jossa keskustelitte uudesta projektista?

- 4.) Kertoisitko minulle hiukan tästä asiakkaasta?

- 4.1 Mitä he tekevät?
  - 4.2 Miksi he lähestyivät teitä tai miksi te lähestyitte heitä?

- 5.) Miten tapaamisessa keskusltetu projekti liittyy asiakkaan laajempaan tuotekehitykseen?

- 6.) Miten sinä tai toimistonne valmistautui tähän tapaamiseen?

- 7.) Voisitko näyttää materiaalia, jota käytit tässä tapaamisessa?  
(Se voi olla mitä tahansa, digitaalinen esitys, muistiinpanot, a4 paperiarkit jne...)

- 7.1 Miksi materiaali näyttää tällaiselta?
  - 7.2 Miksi sitä käytettiin tapaamisessa?
  - 7.3 Milloin tämä materiaali valmisteltiin/luotiin?

- 8.) Ilmenikö keskustelun aikana jotain jota ette olleet ennakoineet?

- 9.) Neuvottelitteko jostain tapaamisen aikana?

- 10.) Mitkä ovat seuraavat askeleet?

### AIHE B (25 MINUUTTIA)

- 11.) Onko teille tulossa pian uutta samankaltaista tapaamista?

- 11.1 Mitä olette valmistelemassa tuohon tapaamiseen?
  - 11.2 Kertoisitko minulle hiukan tästä asiakkaasta?
  - 11.3 Miksi valmistelette tuota materiaalia? Miksi näin?

- 12.) Mitä sinä teet? Millaista materiaalia sinä valmistelet/käytät? Miksi?

Appendix 5

EXEMPLARY QUOTES

THEME

TAILORED PRESENTATIONS

QUOTE

‘...If it comes to that we need to reassure the client about our skills; then we are making those tailored sets. For instance, we can pick some old project examples and go through them more thoroughly...’ (Consultant\_B)

‘The first page has a short introduction about our company, and it is history. On the second page, we have selected references which we think to relate the business field of a potential client.’ (Consultant\_I)

‘With the aid of references, we highlight some of our competence areas such as mechanical design, industrial design and so on...’ (Consultant\_I)

‘...from this project, I have quite an in-depth presentation about how it did progress and what we did in there.’ (Consultant\_B)

‘...Well, often the presentations have some content regarding what we have done before. For instance, some case study about some companies, which are related to the current case.’ (Consultant\_H)

SKETCHES, FIELD NOTES, AND PHOTOS

QUOTE

‘...then we agreed with a client that we can photograph it, so we can look more closely what they need actually is.’ (Consultant\_J)

‘I tend to draw some pictures and things when I am listening to the client so that I can understand the situation better. Then I scan my drawings and attach them to the offer.’ (Consultant\_B)

EXEMPLARY QUOTES

THEME

INITIAL PROPOSALS

QUOTE

‘...sometimes we discuss about making a proposal which is sort of more open and directional document, and then there is the offer...which is very formal in our case’ (Consultant\_F)

‘Well roughly said, it is same as the offer without prices...’ (Consultant\_B)

‘It slightly depends who has made it, but in a sense, it has the same content than in offer.’ (Consultant\_B)

‘First, it describes how we have understood the need of the client. Then it describes the current situation and what is being sought from the project. After that, it reports whom we suggest to the project team. Then it explains the project phases, phase descriptions, estimated hours, the content of each project phase and specific outcomes of each phase. Additionally, it can have some arguments regarding the benefits of working in a certain way.’ Consultant\_ B

‘Well in a good situation, there is this kind of element, which is in between the brief and the offer’ (Consultant\_C)

‘...Then it presented a preliminary cost estimate with a few options that suggest what we think should be potentially done...’ (Consultant\_C)

WORKSHOP MATERIALS

QUOTE

‘I slightly applied what we call a position...It helps to list and prioritize the target groups that are essential for the product to be developed...’ (Consultant\_F)

‘Then we crafted a workshop agenda...’ (Consultant\_I)

EXEMPLARY QUOTES

THEME
OFFERS
QUOTE
‘If I recall right, this client also got quite simple and textual offer. It had a detailed description, arranged in chronological order, regarding what we are going to do, why we are doing that and what is the outcome of that client gets from it. In addition, it had prices of each phase and what is the total amount of the costs...’ (Consultant_K)
‘The offer should contain a quite specific description regarding what we are doing and what not. Otherwise, It would be an open book where we agree to do anything with that price. For that reason, the offer must set the limits of the work quite specifically. In addition, it gives a client an understanding of what s/he is paying for.’ (Consultant_D)
‘Then it describes what is going to be done and how many hours it takes...’ (Consultant_H)
‘Then we tell about the team and who we are. After that there is a company introduction; what is our turnover and so on.’ (Consultant_K)
.....

EXEMPLARY QUOTES

THEME
PROMOTION OF EXPERTISE AND CREDIBILITY
QUOTE
‘Well, these presentations aim to promote credibility and reliability...’ (Consultant_A)
‘Well, these pictures are creating reliability, when we can show that our product is attached as part of...’ (Consultant_A)
‘I think that the credibility can be achieved with the aid of well made graphical material which is clearly made and conveys a crystallized message.’ (Consultant_D)
.....
IDENTIFYING AND NEGOTIATING THE PROJECT RELATED POSSIBILITIES
QUOTE
‘...We agreed that we start to produce a proposal and negotiate...’ (Consultant_D)
‘It is a sort of summary, that these are things that we have discussed. We kind of document the meeting, and then suggest what kind clarifications or information we need to make the offer. Additionally, if we have got some new ideas or suggestions after the meeting, then we bring those up too. Commonly, we go through the topics with the client and assure that we all agree, then we proceed to offer phase.’ (Consultant_K)
‘Commonly, nothing beats the face to face meetings to understand what is actually going on. Well, that happened this time too. I got quite a good brief from them to make the offer. However, I said that I’ll come to visit and present our proposal, then I got there and found that our proposal is incomplete. I said that I’ll send it to within the next few days.’ (Consultant_F)

EXEMPLARY QUOTES

THEME

QUOTE

‘...In cases, where some client has not used design before, I kind have to educate or demonstrate with the aid of good examples what design is...’  
(Consultant\_A)

‘As long as I have been selling the design, I have had to educate more or less what it is...’ (Consultant\_B)

‘...and of course, we use the same material during the client meetings...to increase their understanding’ (Consultant\_B)

‘The case-examples are really important if the new client is not particularly familiar with the design. In those cases, we often show what we have done before...’ (Consultant\_D)

‘It is a bit surprising that many times we must demonstrate our know-how, with the aid of examples, for many companies’ (Consultant\_H)

‘Well, I put it to there as a sort of teaser.’ (Consultant\_B)

DOCUMENTING THE PROJECT RELATED INFORMATION

QUOTE

‘We spend a couple of hours in there wondering that these are the devices to update. Then we documented those devices by taking notes and photographs...’ (Consultant\_K)

‘Well in practice, we produced a memo with the client...’ (Consultant\_E)

‘...Many times, I write and draw. It helps me to understand better what this case is about’ (Consultant\_B)

EXEMPLARY QUOTES

THEME

DIRECTING THE DISCUSSIONS

QUOTE

‘I take the baton, at least partially, to my hands and with the aid of that drawing, I directed the client to discuss about topics which are relevant for us.’  
(Consultant\_F)

“At the beginning of the discussion, we went through the topics...what we would like to discuss and asked is that all right for the client.” (Consultant\_D)

SECURING SALES OF THE DESIGN CONSULTANCY

QUOTE

‘Well, it brings money...I mean really, it is the most crucial document what we have and because that it is essential to use the time when producing it...’  
(Consultant\_I)

EXEMPLARY QUOTES

MAJOR THEME: INTERNAL PLANNING

MINOR THEME: CONSIDERATIONS REGARDING THE CLIENT AND THE COMPETITION

QUOTE

‘If it is a client from the private sector and you know each other well, then I can speak about work estimations quite easily and fast...’ (Consultant\_K)

‘Well, in this case, we did not need to prepare that much. As I said, it was a familiar client, so we did not need to introduce the company to them.’ (Consultant\_B)

‘I´ don’t know if there is a difference between new and old client, perhaps with the old client, we don’t need to agree so specifically.’ (Consultant\_E)

‘In case, we don’t know them that well, then it may be that we must describe the working process to them.’ (Consultant\_K)

MINOR THEME: COLLEGIAL EFFORTS

QUOTE

‘...then we have this practice that one is making the offer, and another is reading it through.’ (Consutant\_I)

MINOR THEME: TACTICS

QUOTE

‘When it does not have the exact hourly fees and prices, it is much easier to discuss with the client that have we understood the case and emphasized it correctly.’ (Consultant\_B)

‘Then we went through it with the client and based on the feedback we refine it as an offer. Then, we present the offer and go through it again with the client.’ (Consultant\_B)

EXEMPLARY QUOTES

MAJOR THEME: INTERNAL PLANNING

MINOR THEME: CUSTOMIZATION OF THE ARTEFACTS

QUOTE

‘...then I picked some relevant references to show that this kind of things we have done in that sector.’ (Consultant\_D)

‘...When I am making the offer, sometimes I need to imagine a bit what’s the case based on information what I have got from the client...’ (Consultant\_K)

‘Then we customize it by reducing the things we have proposed to do...’ (Consultant\_B)

‘...many times, when making the offer, the product must be designed to a certain extent...so I can have some degree of understanding regarding what I’m offering...’ (Consultant\_B)

‘Well, it must always be tailored to that particular client even though we have a clear template. Otherwise, it would not be good for the need of the client’ (Consultant\_I)

‘We will first present the initial proposal so that they can comment it. In case, if it does not take account, all topics and something should be still clarified, we alter it...’ (Consultant\_B)

EXEMPLARY QUOTES

MAJOR THEME: INFORMATION SEARCH

MINOR THEME: DESKTOP SEARCH

QUOTE

‘...For instance, I go to check from the (information provider service) how their turnover has developed and so on...’ (Consultant\_I, Text in brackets added by author)

‘...Well, we might make some research, for instance, from the field the client and their competitors...’ (Consultant\_H)

MINOR THEME: CLIENT INTERVIEWS

QUOTE

‘Well in that stage, we just asked questions and specified the current case. We asked questions, and they explained with the aid of youtube videos and competitors’ products. In addition, they remarked their current product by explaining its structure and different design solutions of it.’ (Consultant\_B)

‘Then, I do some preliminary search, and I write notes regarding what are the topics what we should discuss’ (Consultant\_I)

MINOR THEME: OBSERVATIONS

QUOTE

‘For instance, if we walk in the client premises and they are presenting their products... I tend to sketch a picture from it.’ (Consultant\_B)

EXEMPLARY QUOTES

MAJOR THEME: INTERACTIONS WITH THE CLIENT

MINOR THEME: CLIENT GUIDANCE

QUOTE

‘For instance, they can wonder why we are spending so much time on this and that, and of course, we are listening to them.’ (Consultant\_B)

‘Commonly, when we find the case where the client needs help, and we can provide that help, the client either ask proposal or offer’ (Consultant\_D)

‘Then we have sent it as a word document because some clients have demanded it in that format’ (Consultant\_I)

‘...and they gave pretty good specification, and then they said that now you have one week to do a counter-brief for us...’ (Consultant\_I)

(This one had x amount of pages and quite a lot of text. Commonly we visualize the offers a bit more. However, it does a bit depend on the offer. This one, explains specifically what we are doing in each phase and what does it produce. It is actually a project plan, and almost every client demands it one way or another.’ (Consultant\_K)

MINOR THEME: COOPERATION WITH THE CLIENT

QUOTE

‘...then we give for them preliminary tasks to gather information what we need.’ (Consultant\_I)

‘Clients are making it together with us. We ask questions, and the essential things in that particular design project are listed down to the flip chart...when it is done and documented together like this, then we start working with the project.’ (Consultant\_F)



